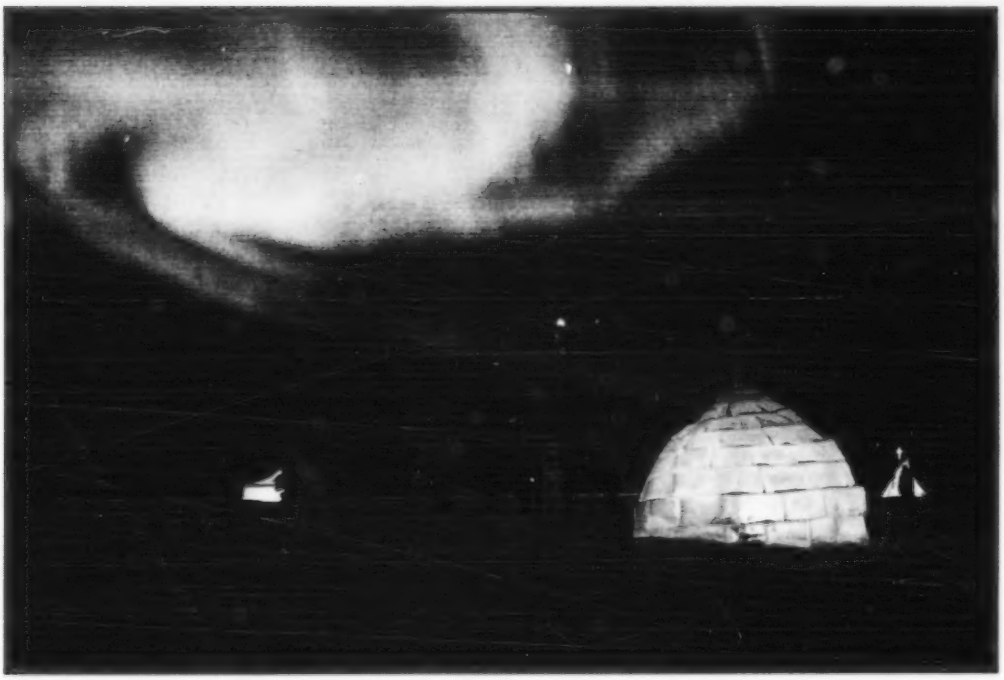
Northwest Territories Industry, Tourism and Investment

2003 – 2004 Aurora Visitors Survey Results



Investment and Economic Analysis
Department of Industry, Tourism and Investment
Government of the Northwest Territories
April 2005

Introduction

Japanese tourism in the Northwest Territories has been a tremendous success story. Starting with humble beginnings in the late 1980's when a handful of visitors came from Japan to see the northern lights, visitation peaked in the winter of 2000/2001 when 13,000 Japanese visited the Northwest Territories. While numbers have declined since this peak as result of the negative impacts of September 11 and the SARS outbreak, the Japanese nevertheless now outnumber U.S. visitors to the NWT. They also come during what has been traditionally off-season, November through April, spinning off benefits to tour operators offering such activities as dog sledding, snowmobiling, skiing and snowshoeing.

In 2003/2004, aurora tourism visitor numbers reached 9,990, up approximately 10% from the previous winter season.

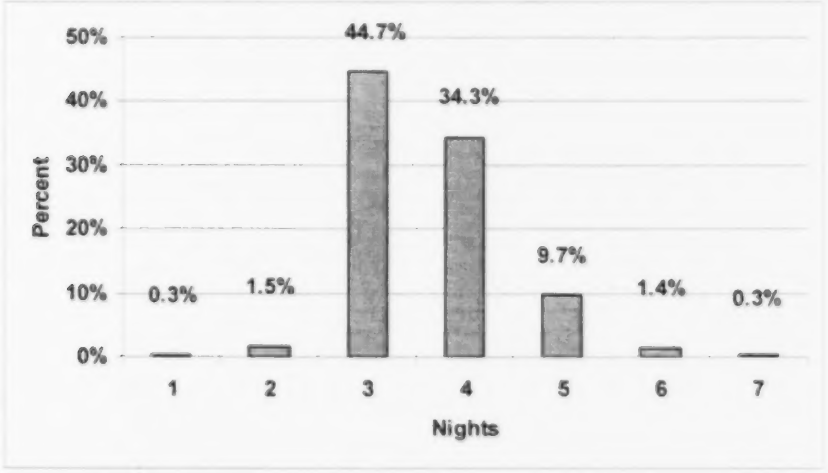
The 2003 survey is part of a series of surveys conducted annually from December through April; surveys are self-administered, and the survey instrument is distributed, collected and the data is entered by staff of major Aurora in-bound tour operators.

Results

The 2003 survey was completed between the months of December 2003 and April 2004 by 726 individuals, of which 63.2% were women, 30.6% were men and the remaining 6.2% did not specify their sex.

The length of stay ranged from one to seven nights, with an average stay of 3.6 nights.

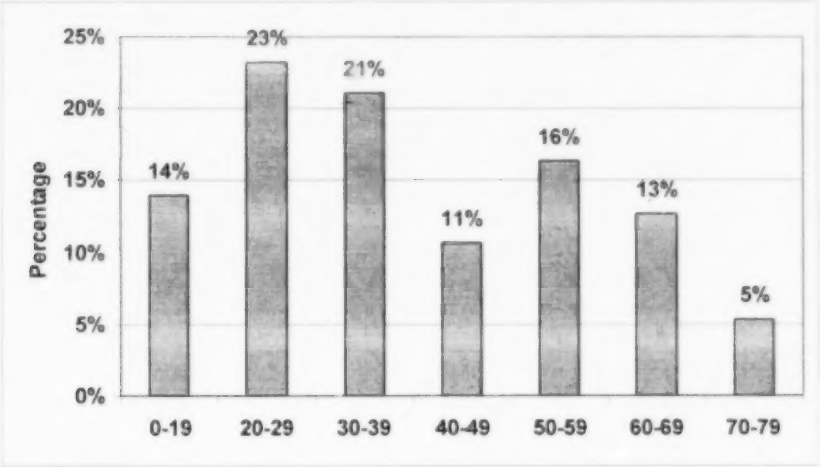
Chart 1: Length of Stay



The number of people traveling together varied widely, ranging from groups of one to groups of 49. Groups of ten individuals or less made up over 95% of the tourists with the average group size being 3.3.

Of the individuals who participated the youngest was six years old and the oldest was 79. The average age of these individuals was 36.6. 43.3% of visitors were between the ages of 20 and 39.

Chart 2: Age



The survey results showed that two thirds (67%) of Japanese were female. The age distribution of males and females was similar. Of women, 54% were under the age of 40 and for men, 48% of those surveyed were under the age of 40.

Chart 3: Gender

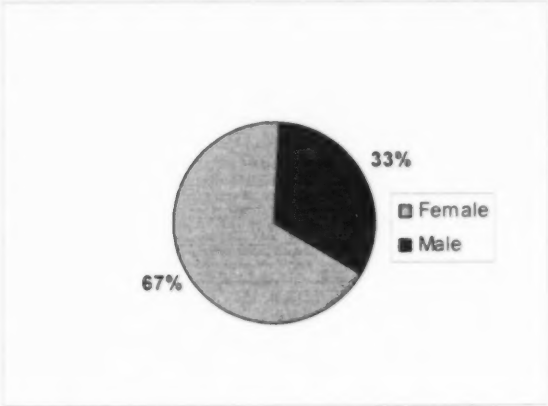
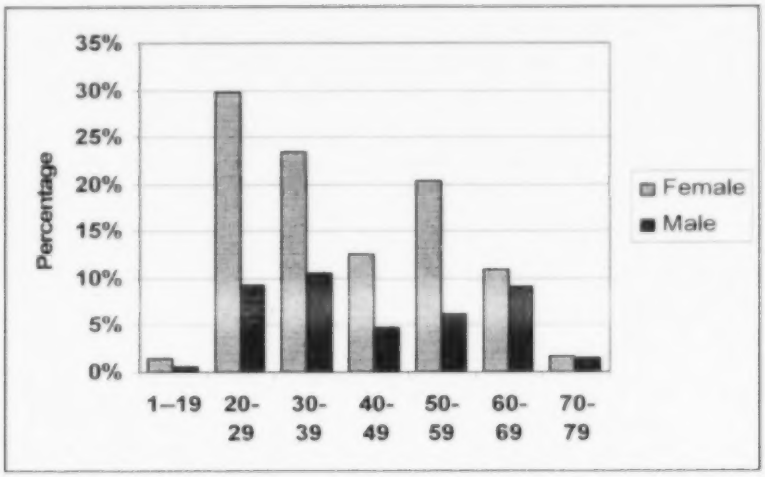


Chart 4: Age/Gender



One fifth of individuals surveyed were professionals and another one fifth were at home or retired. The other large groups were clerical staff and civil servants. There is significant difference in occupation based on gender. For women, the largest proportion, 26%, are at home or retired closely followed by clerical staff at 19%. As for men, the largest occupation was professional, making up 32% of all male employment.

Chart 5: Occupation

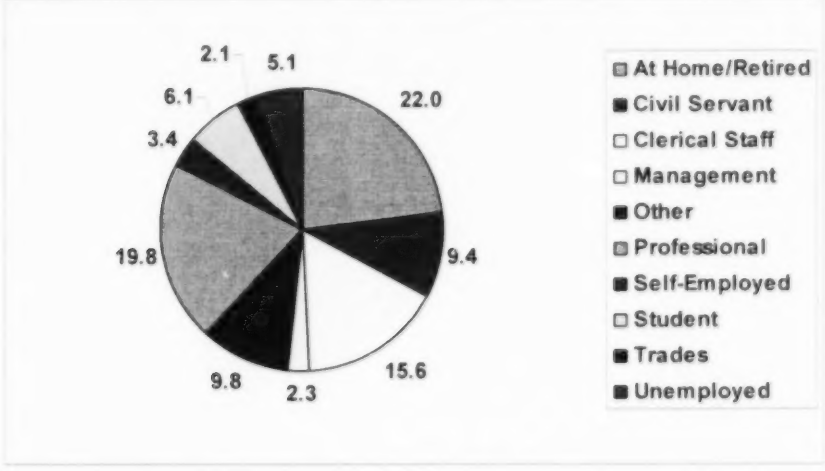


Chart 5a: Occupation

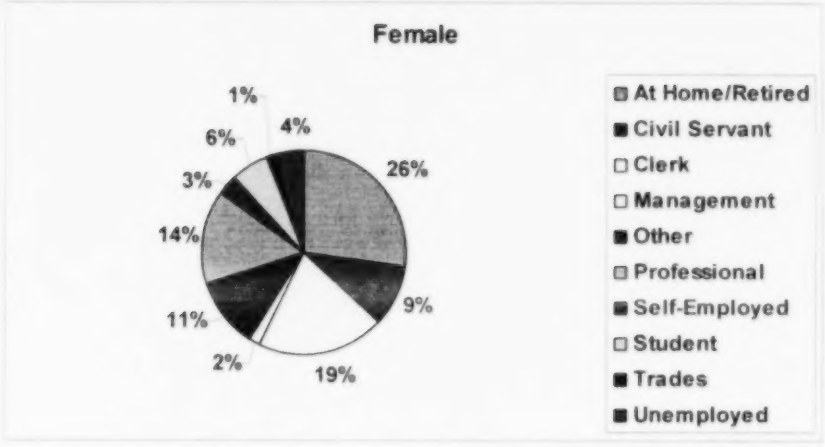
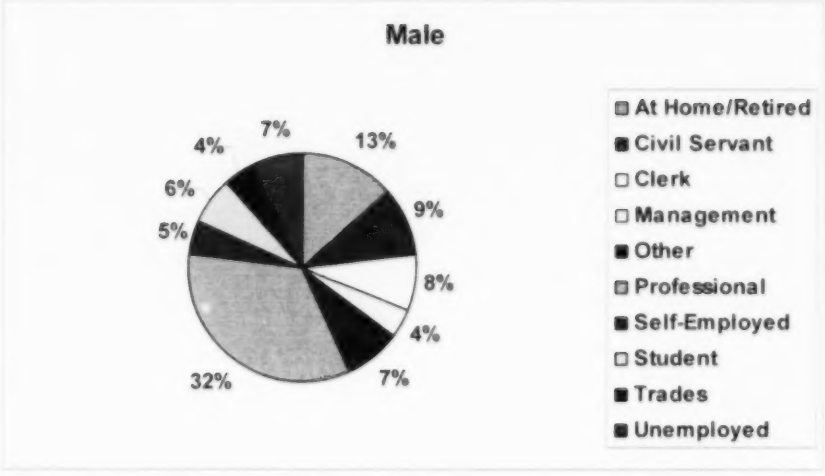
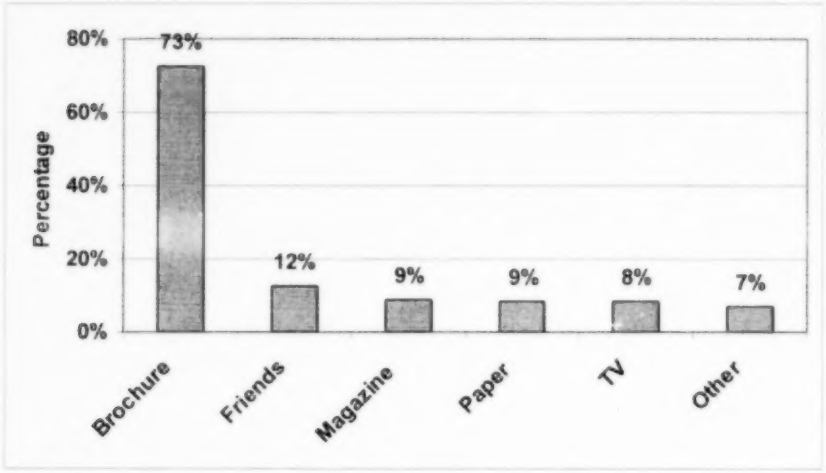


Chart 5b: Occupation



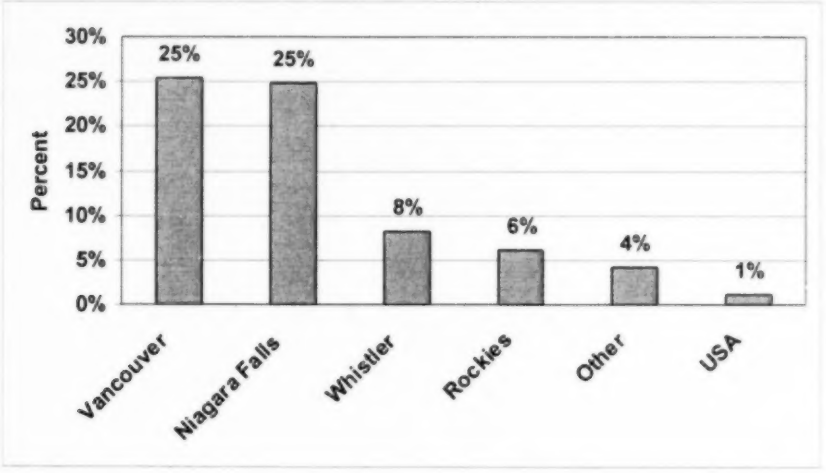
Over 72% of visitors found information about Yellowknife from brochures. The second largest source of information is from friends and family.

Chart 6: Sources of Information



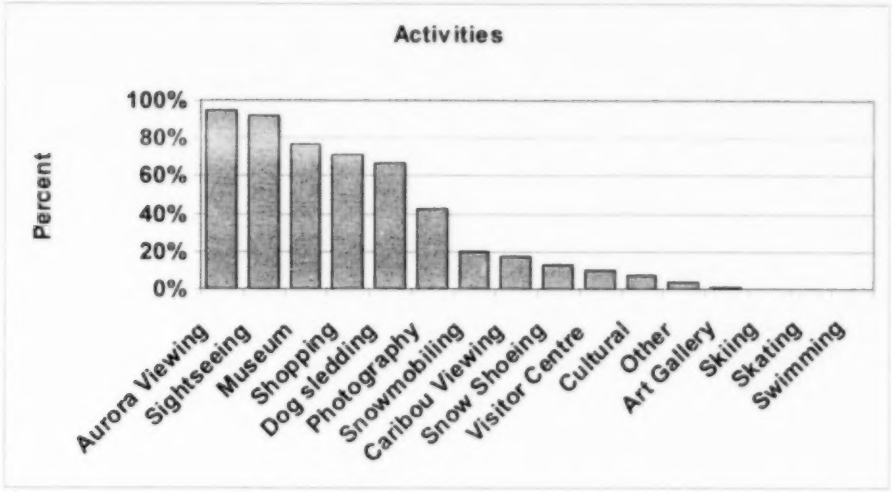
Of the respondents, one quarter also visited both Vancouver and Niagara Falls. The other destinations were much less popular, and only 1.2% of the visitors also visited the United States.

Chart 7: Destinations



Aurora viewing was the most common activity of the visitors with almost 95% taking part in the activity. Sightseeing, museums, and shopping were also very popular among the respondents. The least popular activities were viewing art galleries, skiing, skating, and swimming. Dogsled tours were by far the most popular touring activity.

Chart 8: Activities



Based on age, individuals were separated into two categories: Cluster one was made up of individuals with an average age of 30 and Cluster two was made up of individuals with an average age of 55. From this we were able to see that though there were two distinct age groups traveling. However, their choice of activities remained relatively similar as illustrated in charts 10 and 11.

Chart 9: Age Frequency

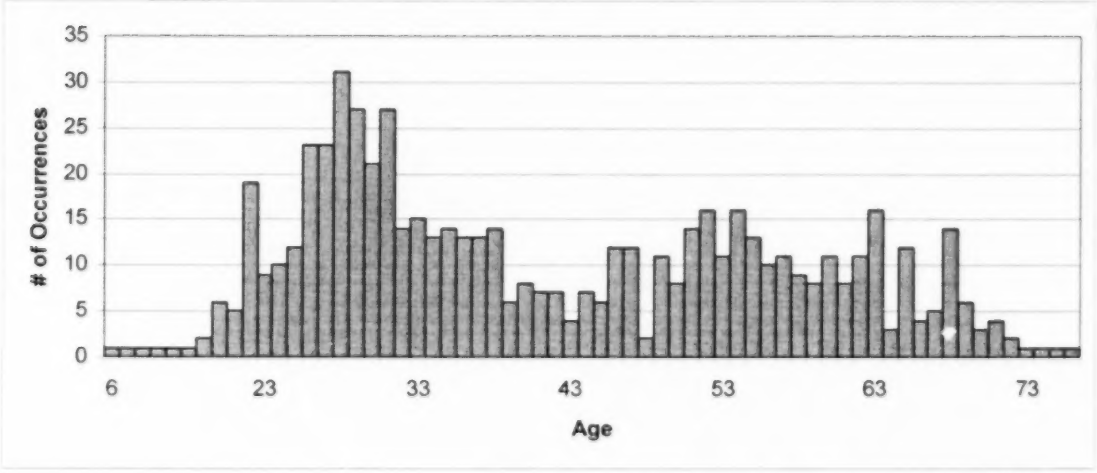


Chart 10: Cluster 1 Activities

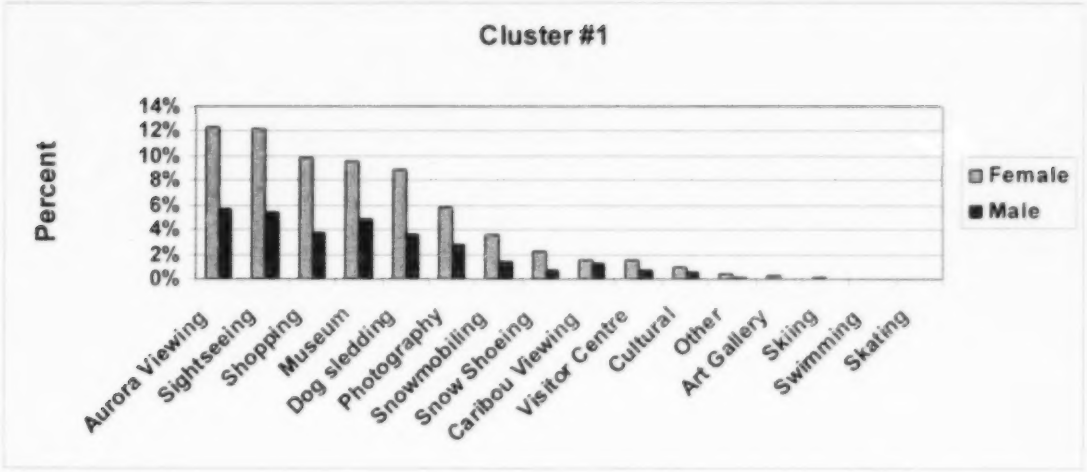
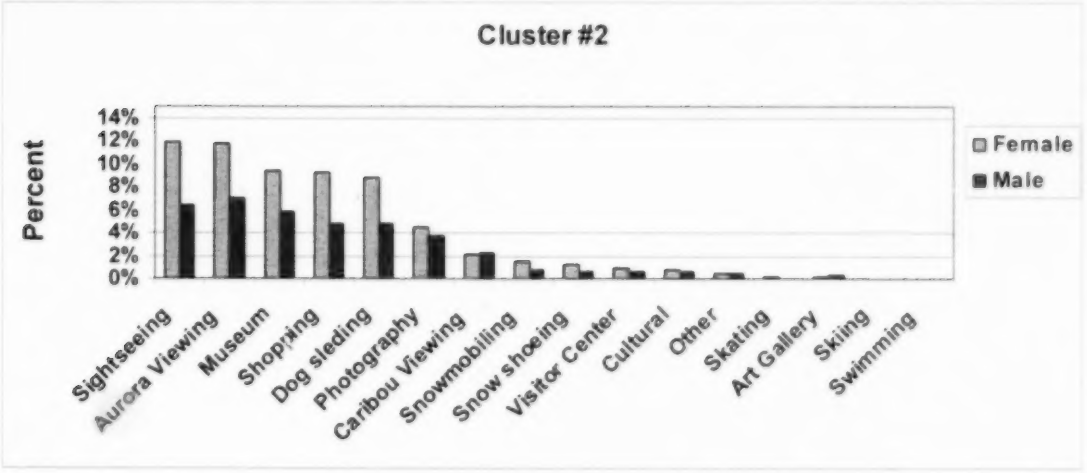
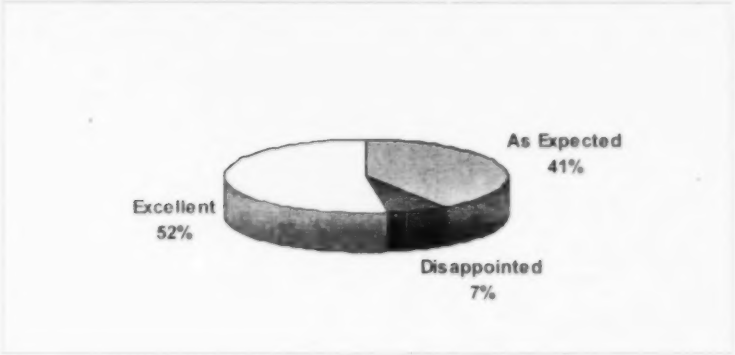


Chart 11: Cluster 2 Activities



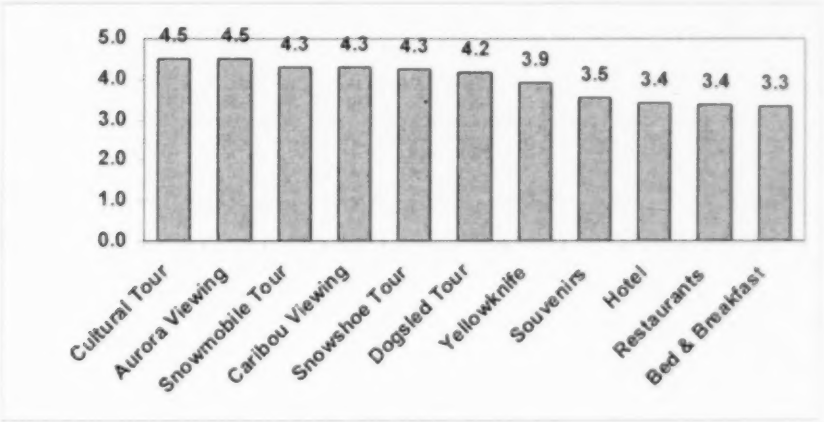
Of the visitors who did the aurora viewing, 96.1% were able to see the aurora borealis. Of the people who saw the aurora, only 7% were disappointed with what they saw.

Chart 12: Aurora Viewing Experience



The visitors were asked to rate the activities and services that they used while on their stay in Yellowknife. They were rated on a scale of one to five, where one is poor and five is excellent. All of the cultural tours and activities were rated very high by most of the respondents. The services in Yellowknife were also rated well. However, hotels, restaurants and bed and breakfasts received relatively low ratings.

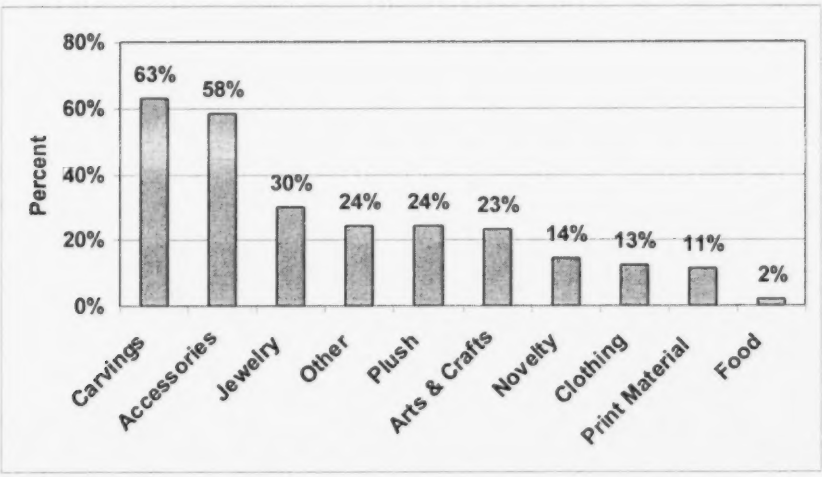
Chart 13: Ratings



Spending Patterns

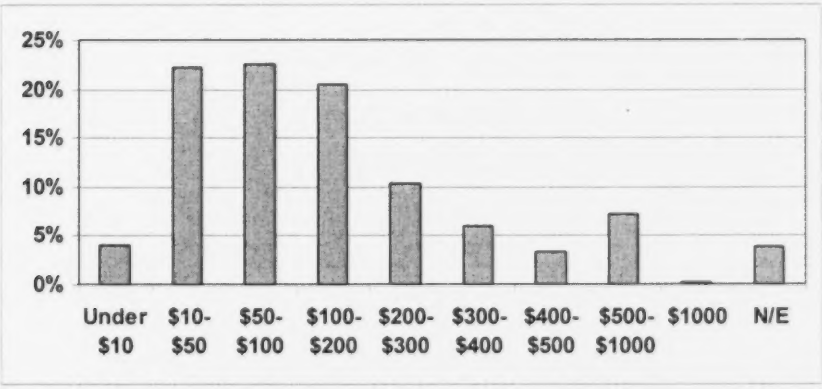
Carvings were the most popular purchase for the visitors as almost 63% of all Japanese visitors purchased some type of carving. Accessories were also very popular.

Chart 14: Purchases



Souvenirs can be considered a large purchase item for the Japanese tourists as 75% of purchases ranged from $10-$300.

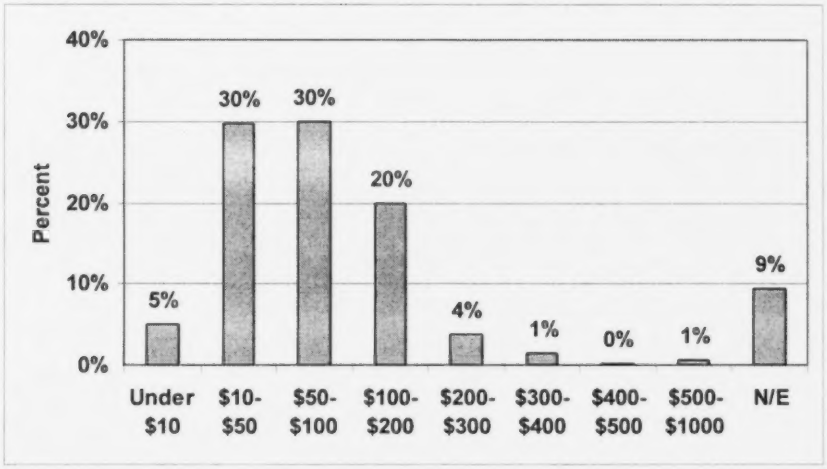
Chart 15: Souvenir Expenditure



Note 1 N/E – no expenditure

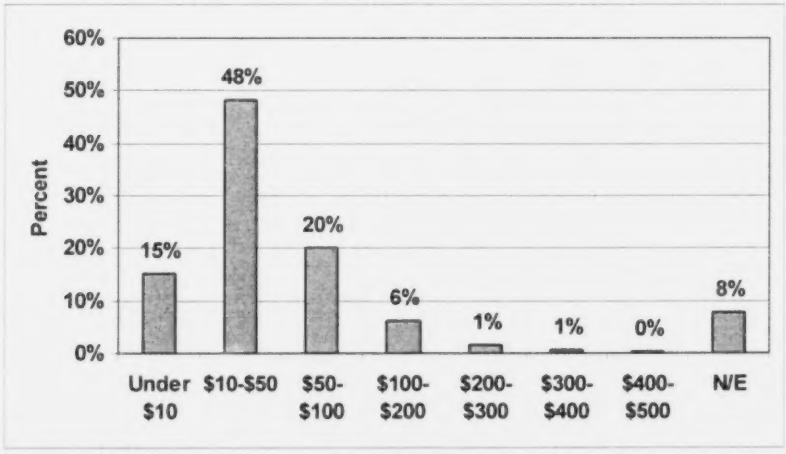
80% of restaurant purchases were between $10-$200 making spending in restaurants a relatively large outlay for the Japanese as the average length of stay was only 3.6 days.

Chart 16: Restaurant Expenditures



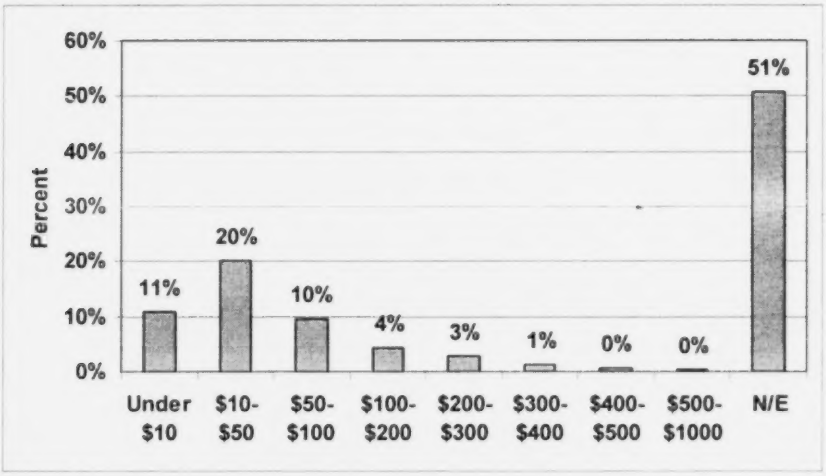
Groceries tended to be a small expenditure for Japanese tourists as 83% of purchases where that of $100 or less, with almost half spending between $10 and $50.

Chart 17: Grocery Expenditures



Just over half of the respondents made no purchases of arts and crafts items. Only 4% of respondents spent more than $200 on arts and crafts items, while 20% spent between ten and fifty dollars.

Chart 18: Arts and Crafts Expenditures



Discussion

The survey results show that a large proportion, two-thirds, of Japanese visitors are women, and that there is a distinct dichotomy in age groups for both genders. These demographic characteristics may have implications for marketing.

While tours and activities were rated highly, hotels and services received much lower average ratings. These lower ratings suggest there may be some problems in these areas that should be addressed.

The primary reason for visiting the NWT and in Yellowknife in particular for most if not all Japanese is to view the aurora borealis. Viewing rates are extremely high, as is the satisfaction rating. These results support Yellowknife's claim to be one the world's premier aurora viewing locations.

Dog sledding tours are by far the most popular of the activities undertaken, after Aurora viewing. The popularity of this activity suggests that overnight trips by dog team may be a product possibility that could attract more adventurous, independent Japanese visitors.

Carvings are by far most popular purchased item. This result suggests the persistence of the associations of carvings with the North. Combined with the popularity of dog sledding as an activity, there is a strong suggestion that

Japanese visitors associate with the Northwest Territories images traditionally associated with the NWT when Nunavut was still part of the territory.

Survey respondents reported spending more frequently, and in larger amounts, on souvenirs than on arts and crafts items. This result suggests that even such items as carvings are regarded as a souvenir rather than an arts or craft. This conclusion has implications for marketing goods to Japanese visitors. The primary motive to purchase is the desire to obtain an object that reminds the purchaser of the trip, an item that is somehow representative of the area.